

Message Text

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ACTION TRSE-00

INFO OCT-01 EUR-12 EA-07 ISO-00 AID-05 CIAE-00 COME-00
EB-07 FRB-03 INR-07 NSAE-00 USIA-06 XMB-02
OPIC-03 SP-02 LAB-04 EPG-02 SIL-01 OMB-01 NSC-05
SS-15 STR-04 CEA-01 OES-07 L-03 H-01 PA-01 PRS-01
AGRE-00 IO-13 NEA-10 /124 W
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P R 040256Z MAY 77
FM AMEMBASSY MANILA
TO SECSTATE WASHDC PRIORITY 9216
INFO AMEMBASSY BANGKOK PRIORITY
USMISSION EC BRUSSELS

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USADB
FOR NAC AGENCIES

E O 11652: ADS, DECLAS 8/4/77
TAGS: EAID, EFIN, TH
SUBJ: PROPOSED ADB TECHNICAL ASSISTANCE TO THAILAND FOR INLAND
FISHERIES PROJECT

SUMMARY: ADB MANAGEMENT PROPOSES \$146,000 TECHNICAL
ASSISTANCE (TA) GRANT TO GOVT OF THAILAND FOR THE FORMULATION
OF A PROJECT FOR THE DEVELOPMENT OF INLAND FISHERIES THROUGH
AQUACULTURE TO BE FINANCED BY THE EUROPEAN ECONOMIC
COMMUNITY UNDER THE FINANCING ARRANGEMENTS CONCLUDED WITH
THE BANK ON JAN 7, 1977. USADB SUPPORTS PROPOSED TA.
END SUMMARY.

1. ADB DOC. R42-77 DESCRIBING PROPOSED TECHNICAL ASSISTANCE
(TA) GRANT POUCHED ADDRESSEES APRIL 29. BOARD CONSIDERATION
SCHEDULED FOR MAY 19.

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2. FISHERIES SECTOR PLAYS SUBSTANTIAL ROLE IN THAI ECONOMY,
ACCOUNTING FOR 3.5 PERCENT OF GNP IN 1975. HOWEVER,
FISH PRODUCTION, WHICH ROSE NINEFOLD DURING 1960-72,
HAS BEEN DECLINING IN RECENT YEARS. TOTAL FISH PRO-
DUCTION ROSE FROM 187,000 M.T. IN 1960 TO PEAK OF
1.68 MILLION M.T. IN 1972, THEN DECLINED TO
1.37 MILLION IN 1975. SOME 94 PERCENT OF THE 1960-72

INCREASE WAS ACCOUNTED FOR BY MARINE FISH WHICH HAVE NOW BEEN QUITE FULLY EXPLOITED (FULLY EXPLOITED IN CASE OF DEMERSAL FISH). MOREOVER, A FURTHER DECLINE OF ABOUT 300,000 M.T. IS EXPECTED TO RESULT FROM LOSS OF FISHING GROUNDS TO OTHER COUNTRIES IN WAKE OF LAW OF SEA CONFERENCES. ACCORDINGLY, THERE IS COMPELLING NEED FOR GROWTH OF MODEST BUT POTENTIALLY IMPORTANT INLAND FISHERIES.

3. ALTHOUGH PRESENTLY ACCOUNTING FOR ONLY 12.4 PERCENT OF TOTAL FISH CATCH, INLAND FISH CATCH HAS RISEN MORE THAN FOURFOLD FROM 40,000 M.T. IN 1960 TO 170,000 M.T. IN 1975. AQUACULTURE ACCOUNTED FOR 116,000 M.T., OR 72.5 PERCENT, OF TOTAL INLAND FISH PRODUCTION IN 1974. AQUACULTURE DIVIDES ROUGHLY INTO FRESHWATER AQUACULTURE (27 PERCENT OF TOTAL), PRACTICE MAINLY IN NORTHERN AND NORTHEAST THAILAND; AND MARINE AND BRACKISHWATER AQUACULTURE, IN SWAMPS AND TIDAL MUDFLATS ALONG GULF OF THAILAND. SOUTHERN THAILAND HAS EXTENSIVE AND RELATIVELY UNPOLLUTED HABITATS WHICH ARE IDEAL FOR AQUACULTURE, BUT WHERE LITTLE AQUACULTURE IS PRACTICED FOR LACK OF PRODUCTION AND PROCESSING FACILITIES. FISH/SHRIMP CULTURE IS CONCENTRATED AROUND BANGKOK BECAUSE OF READY ACCESS TO MARKETING AND TRANSPORT FACILITIES AND OTHER INFRASTRUCTURE NEEDED TO PRESERVE, PROCESS AND MARKET PRODUCTION. ALTOGETHER, SOME 1.3 MILLION HA. ARE BELIEVED AVAILABLE FOR AQUACULTURE DEVELOPMENT, WHICH COMPARES WITH 20,680 HA. PRESENTLY CULTIVATED. IN GENERAL, AREAS WITH BEST ENVIRONMENT FOR AQUACULTURE ARE THOSE WITH POOREST LIMITED OFFICIAL USE

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FACILITIES FOR ITS DEVELOPMENT.

4. BANK FACT-FINDING MISSION VISITING THAILAND DURING NOV-DEC 1976 CONCLUDED THAT THAILAND WOULD REQUIRE TA FOR CARRYING OUT COMPREHENSIVE STUDY TO ASSESS FEASIBILITY OF A PROPOSED PROJECT. IN VIEW PRESENT INADEQUACIES IN AREA OF FISHERIES MANAGEMENT AND STAFF SUPPORT, AQUACULTURE DEVELOPMENT WOULD HAVE TO PROCEED IN SEVERAL STAGES. NEED IS FOR FORMULATION OF A PROJECT WHICH SHOULD AIM AT IMPROVEMENT OF EXISTING PRACTICES AND EXPANSION OF AQUACULTURE OVER NEW AREAS TO INCREASE PRODUCTION THROUGH INTRODUCTION OF APPROPRIATE CULTURE TECHNIQUES.

5. PROJECT TO BE FORMULATED WOULD HAVE TWO MAIN OBJECTIVES: INCREASE OF FISH PRODUCTION, MAINLY FOR DOMESTIC CONSUMPTION; AND ASSISTANCE TO FISH FARMERS IN IMPROVING THEIR SOCIO-ECONOMIC CONDITIONS. TENTATIVE SCOPE OF PROJECT INCLUDES:

- (A) RESERVOIR AND LAKE AQUACULTURE DEVELOPMENT, INCLUDING CONSTRUCTION OF FISH CAGES FOR INTENSIVE CULTURE IN NORTHEASTERN AND SOUTHERN THAILAND;
- (B) INTENSIVE FISH/SHRIMP FISHING IN NORTHEAST THAILAND;
- (C) DEVELOPMENT OF NEW AREAS FOR BRACKISHWATER AQUACULTURE;
- (D) PROVISION OF HATCHERY UNITS;
- (E) RELATED INFRASTRUCTURE SUCH AS PELLET-FEED MANUFACTURING AND FISH/SHRIMP PROCESSING PLANTS, AND TRANSPORTATION AND MARKETING FACILITIES;
- (F) MODEL FARMS AND EXTENSION SERVICES.

6. THREE REGIONS HAVE BEEN TENTATIVELY SELECTED FOR FORMULATION OF PROJECT: (I) NORTHEAST, WHICH HAS LARGEST POTENTIAL FOR FRESH WATER DEVELOPMENT AND LOWEST (IN THAILAND) LEVEL OF PER CAPITA FISH CONSUMPTION; AND CENTRAL AND SOUTHWESTERN COASTAL AREAS, WHICH OFFER GREATEST POTENTIAL FOR BRACKISHWATER DEVELOPMENT, ESPECIALLY LIMITED OFFICIAL USE

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AROUND SONGKHLA LAKE. THREE AREAS WOULD BE STUDIED AS SEPARATE SUB-PROJECTS AND THEIR INTER SE PRIORITY FOR DEVELOPMENT WOULD BE DETERMINED BY CONSULTANT TEAM. EMPHASIS WOULD BE GIVEN TO SELECTION OF MOST APPROPRIATE TECHNOLOGY IN PROJECT AREAS, PARTICULARLY IN FIELDS OF HATCHERY, FEEDING, FISHING, PROCESSING AND PRESERVING.

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ACTION TRSE-00

INFO OCT-01 EUR-12 EA-07 ISO-00 AID-05 CIAE-00 COME-00

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AGRE-00 IO-13 NEA-10 /124 W

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P R 040256Z MAY 77

FM AMEMBASSY MANILA

TO SECSTATE WASHDC PRIORITY 9217

INFO AMEMBASSY BANGKOK PRIORITY

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CONSULTANTS WOULD IDENTIFY FISH/SHRIMP SPECIES MOST SUITED FOR CULTIVATION, DEPENDING ON AVAILABILITY TECHNICAL KNOW-HOW FOR PRODUCTION OF SEED AND CULTIVATION OF FISH/SHRIMP AND MARKET DEMAND.

7. OBJECTIVE OF PROPOSED TA IS FORMULATION OF AN INLAND FISHERIES DEVELOPMENT PROJECT INCLUDING EXAMINATION OF TECHNICAL FEASIBILITY, PROPOSALS FOR EXECUTING AGENCY ARRANGEMENTS, AND DETERMINATION OF ECONOMIC AND FINANCIAL VIABILITY. PROPOSED TA WILL REQUIRE SERVICES OF FIVE CONSULTANTS FOR A TOTAL OF 17 MAN-MONTHS WITH EXPERTISE IN AQUACULTURE (5 MAN-MONTHS); INSTITUTIONS (5); FISHER ECONOMICS/FINANCE (3); PROCESSING/MARKETING (2); HATCHERIES (2). TERMS OF REFERENCE FOR CONSULTANTS WILL INCLUDE REVIEW OF CURRENT INLAND FISHERIES DEVELOPMENT PROGRAMS; EXAMINATION OF SEED PRODUCTION AND PROCESSING FACILITIES; IDENTIFICATION OF KEY PROBLEM AREAS PRESENTLY HAMPERING DEVELOPMENT; CONFIRMATION AS TO SUITABILITY OF THREE AREAS PROPOSED FOR DEVELOPMENT (PARA. 6); STUDIES OF EXISTING FISHERIES-RELATED LIMITED OFFICIAL USE

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ORGANIZATIONS AND RECOMMENDED IMPROVEMENTS IN PRESENT INSTITUTIONAL ARRANGEMENTS; AND PREPARATION OF DETAILED FEASIBILITY REPORT ON ORGANIZATIONAL, TECHNICAL, FINANCIAL AND ECONOMIC SOUNDNESS OF PROPOSED PROJECT.

8. EXECUTING AGENCY FOR PROPOSED TA WOULD BE DEPARTMENT OF FISHERIES (DOF) UNDER MINISTRY OF AGRICULTURE AND COOPERATIVES (MOAC). DOF IS RESPONSIBLE FOR ALL MATTERS PERTAINING TO FISHERIES ADMINISTRATION AND PLANNING. FRESHWATER FISHERIES DIVISION AND BRACKISHWATER FISHERIES DIVISION OF DOF WOULD BE MAINLY RESPONSIBLE FOR IMPLEMENTATION. DOF WILL BE ASSISTED BY COORDINATING COMMITTEE COMPOSED OF REPS FROM DOF AND OTHER APPROPRIATE GOVT AGENCIES. CHAIRMAN OF COMMITTEE WILL BE DIRECTOR-GENERAL OF DOF, TO BE ASSISTED IN TURN BY DEPUTY UNDERSECRETARY MOAC. SENIOR OFFICIALS AND TECHNICAL STAFF OF DOF ARE WELL QUALIFIED AND COMPETENT.

9. TOTAL COST OF PROPOSED TA IS ESTIMATED AT \$161,000 OF WHICH \$146,000 FOREX. EUROPEAN ECONOMIC COMMUNITY (EEC) HAS AGREED TO FINANCE THE FOREX COSTS UNDER THE FINANCING ARRANGEMENTS AGREED TO BETWEEN THE BANK AND EEC ON JAN 7, 1977. GOVT OF THAILAND WILL COVER LOCAL

CURRENCY COSTS ESTIMATED AT \$15,000.

10. COST OF POSSIBLE FUTURE PROJECT, TO WHICH BANK NOT COMMITTED AT THIS TIME, IS ESTIMATED AT \$14 MILLION, OF WHICH ABOUT \$5 MILLION FOREX.

11. GOVT HAS ATTACHED HIGH PRIORITY TO DEVELOPMENT OF INLAND FISHERIES THROUGH AQUACULTURE IN ORDER TO HELP MEET INCREASING DEMAND FOR CHEAP PROTEIN AND REPLACE PART OF PRESENT AND PROSPECTIVE DECLINE IN MARINE CATCH. POSSIBLE FUTURE PROJECT WILL ALSO APPEAR TO INVOLVE SIGNIFICANT EMPLOYMENT BENEFITS TO PRIMARILY RURAL AREAS. LIMITED OFFICIAL USE

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USADB SUPPORTS PROPOSED TA GRANT AND RECOMMENDS FAVORABLE NAC ACTION.

12. REQUEST AMEMBASSY BANGKOK'S CGMMMENTS FOR NAC AGENCIES, INFO USADB MANILA, PURSUANT TO STATE 119795 DATED 3 JULY 1972. STULL

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